TRIUMPH BANK
Job Description

Job Title: Loan Set-Up Specialist
Reports to: Mortgage Division President
Department: Mortgage
FLSA Status: Non-Exempt

Summary:
The Loan Set-Up Specialist is responsible for providing support to the loan process by ordering and tracking required loan documents and appraisals, title commitments and insurance policies.

Essential Duties and Responsibilities:
• Assist loan process by ordering and tracking required loan documents such as appraisals, title commitments, and insurance policies;
• Provide support to loan officers and processors;
• Ensure timely and accurate packaging of all loans originated by loan officers;
• Ensure that all loan documentation is complete, accurate, verified and complies with company policy;
• Review file documentation and make sure all items needed are requested;
• Order and coordinate loan documents as needed;
• Meet crucial deadlines requested;
• Maintain excellent customer relations and the confidentiality of the Bank’s customers;
• Perform all other duties as assigned.

Education/Experience:
High School diploma or equivalent; and 3-5 years related experience or equivalent. Prior mortgage experience is preferred.

Knowledge, Skills and Abilities:
• Effective interpersonal relationships with customers, management and team members;
• Ability to perform interpersonal tasks quickly and accurately;
• A thorough understanding and application of all policies, procedures and regulations pertaining to the work of a Loan Set Up Specialist;
• Ability to operate in a team environment to accomplish shared goals;
• Ability to work comfortably in a paperless environment;
• Ability to effectively manage time as related to daily tasks;
• Ability to solve practical problems and interpret a variety of instructions furnished in written, oral or schedule form;
• Ability to prioritize multiple demands in a high pressure environment while maintaining professional demeanor; and
- Proficient in Microsoft Office programs as well as in house document retrieval and preparation systems and electronic communications.

**Physical Demands:**
The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential job functions.
- Sit or Stand or walk for extended periods
- See to read small print or complex reports
- Effectively communicate orally
- Manually operate keyboard, mouse and other personal computing devices.
- Occasionally lift up to 10 pounds

**Compensation and Benefits:**
This position is eligible for all group benefits of a non-exempt employee as defined in the Triumph Bank Employee Handbook. The Mortgage Division President will evaluate the performance of the Loan Set-Up Specialist on at least an annual basis.